



Packaged  
Facts

**David Sprinkle**  
**Research Director, Packaged Facts**  
**[dsprinkle@marketresearch.com](mailto:dsprinkle@marketresearch.com)**

# Pet Market Trends 2017

- *plateau in pet ownership?*
- *online retailing reaches critical mass*
- *other signs of these pet parenting times*

# Dog/Cat HH Ownership Rates , 2006-2016

	2006	2010	2012	2014	2015	2016
<b>Dog(s) or Cat(s)</b>	47.8%	49.9%	51.3%	51.1%	54.1%	52.1%
<b>Dog(s)</b>	35.4%	36.8%	38.3%	38.2%	41.1%	40.0%
<b>Cat(s)</b>	25.0%	24.8%	25.3%	24.8%	26.4%	23.9%
<b>Dog(s) and Cat(s)</b>	12.6%	11.7%	12.3%	11.8%	13.4%	11.9%
<b>Other Pets</b>	15.0%	12.2%	12.8%	11.3%	10.6%	11.7%

Simmons Market Research National Consumer Survey, Fall 2016. Copyright: 2017

## Dog HH ownership rates by age bracket/generational cohort

	2006	2008	2010	2012	2014	2015	2016
Overall	35.4%	35.2%	36.8%	38.3%	38.2%	41.1%	40.0%
<b>Age 18-34 (current Millennials)</b>	<b>36.0%</b>	<b>35.8%</b>	<b>39.1%</b>	<b>44.4%</b>	<b>44.2%</b>	<b>47.4%</b>	<b>45.2%</b>
Age 35-49 (current Gen X)	41.5%	42.1%	44.5%	44.2%	44.7%	43.3%	42.6%
Age 50-69 (current Boomers)	37.4%	34.7%	36.0%	36.5%	37.9%	42.0%	40.4%
<b>Age 70+ (Older Seniors)</b>	<b>18.9%</b>	<b>21.6%</b>	<b>21.3%</b>	<b>23.6%</b>	<b>20.8%</b>	<b>26.3%</b>	<b>27.3%</b>

Simmons Market Research National Consumer Survey, Fall 2016. Copyright: 2017

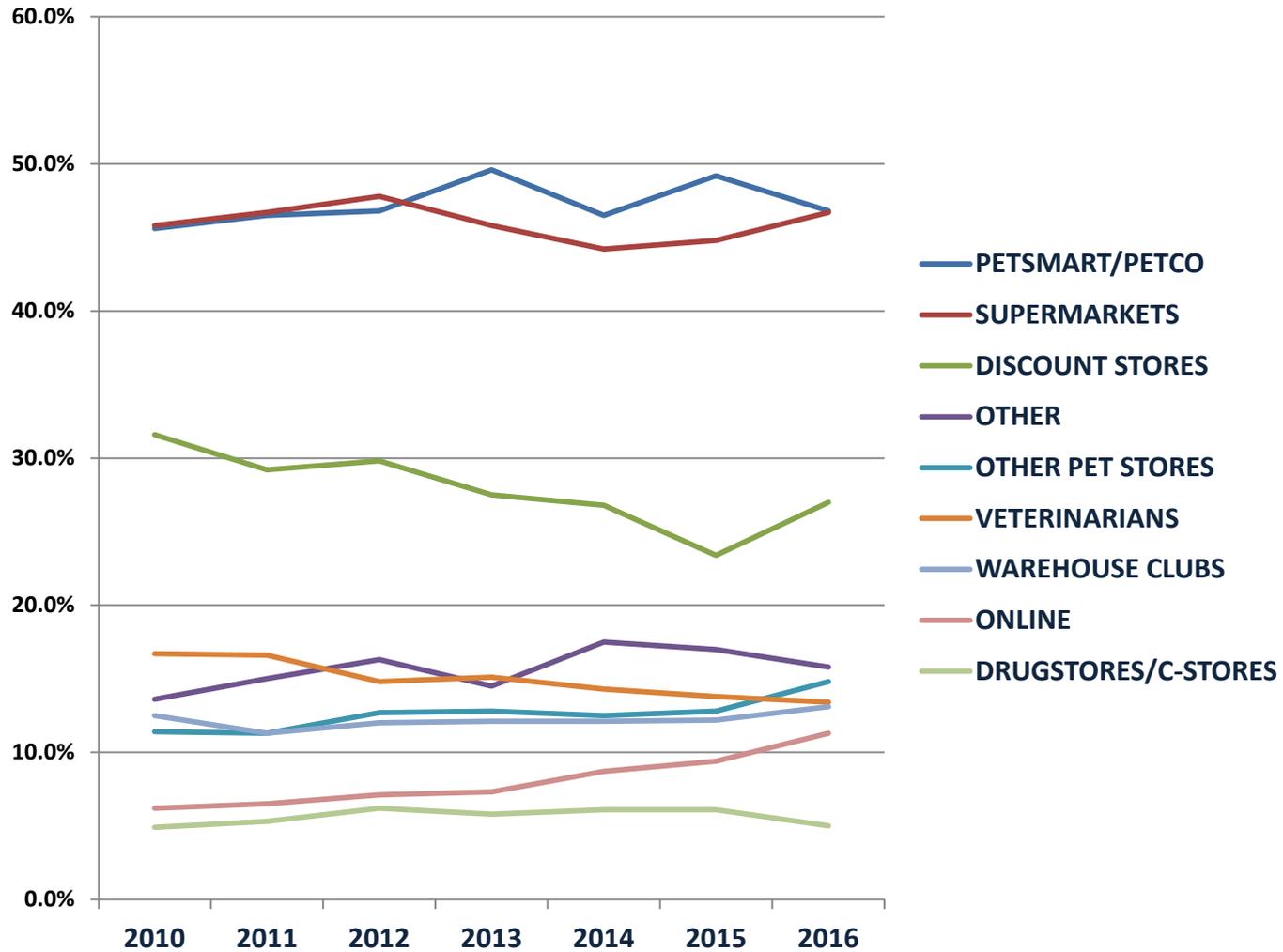
## Cat HH ownership rates by age bracket/generational cohort

	2006	2008	2010	2012	2014	2015	2016
<b>Overall</b>	<b>25.0%</b>	<b>26.7%</b>	<b>24.8%</b>	<b>25.3%</b>	<b>24.8%</b>	<b>26.4%</b>	<b>23.9%</b>
Age 18-34 (current Millennials)	23.9%	28.5%	22.0%	28.4%	25.1%	25.4%	22.7%
Age 35-49 (current Gen X)	28.4%	31.4%	29.7%	30.1%	27.4%	32.4%	25.7%
Age 50-69 (current Boomers)	27.6%	26.0%	27.1%	24.9%	26.4%	26.2%	25.1%
<b>Age 70+ (Seniors)</b>	<b>14.4%</b>	<b>16.3%</b>	<b>15.3%</b>	<b>13.8%</b>	<b>17.0%</b>	<b>19.4%</b>	<b>20.3%</b>

Simmons Market Research National Consumer Survey, Fall 2016. Copyright: 2017

- *plateau in pet ownership?*
- **online retailing reaches critical mass**
- *other signs of these pet parenting times*

# Retail Shopping Channels for Pet Products, 2010-2016



Source: Packaged Facts, *U.S. Pet Market Outlook, 2017-2018* (upcoming);  
 Simmons Market Research National Consumer Surveys. Copyright: 2017

# Retail Shopping Channels for Pet Products, 2010-2016

	2010	2012	2014	2015	2016
Supermarkets	47.4%	47.5%	46.0%	44.7%	47.2%
Petsmart/Petco	46.3%	47.7%	47.7%	48.1%	47.1%
Petsmart	34.8%	35.8%	36.9%	35.8%	36.2%
Petco	24.8%	27.4%	27.1%	28.7%	26.9%
Discount Stores	30.8%	29.1%	27.3%	23.8%	25.8%
Other Pet Stores	13.1%	12.8%	12.7%	11.7%	15.7%
Veterinarians	17.6%	15.1%	15.2%	15.9%	14.6%
<b>Online</b>	<b>7.0%</b>	<b>7.6%</b>	<b>9.7%</b>	<b>9.3%</b>	<b>12.7%</b>
Warehouse Clubs	11.4%	13.0%	11.4%	10.1%	12.4%
Drugstores/C-stores	4.4%	6.6%	6.3%	7.0%	5.1%
Other	13.0%	13.6%	16.2%	17.1%	16.1%

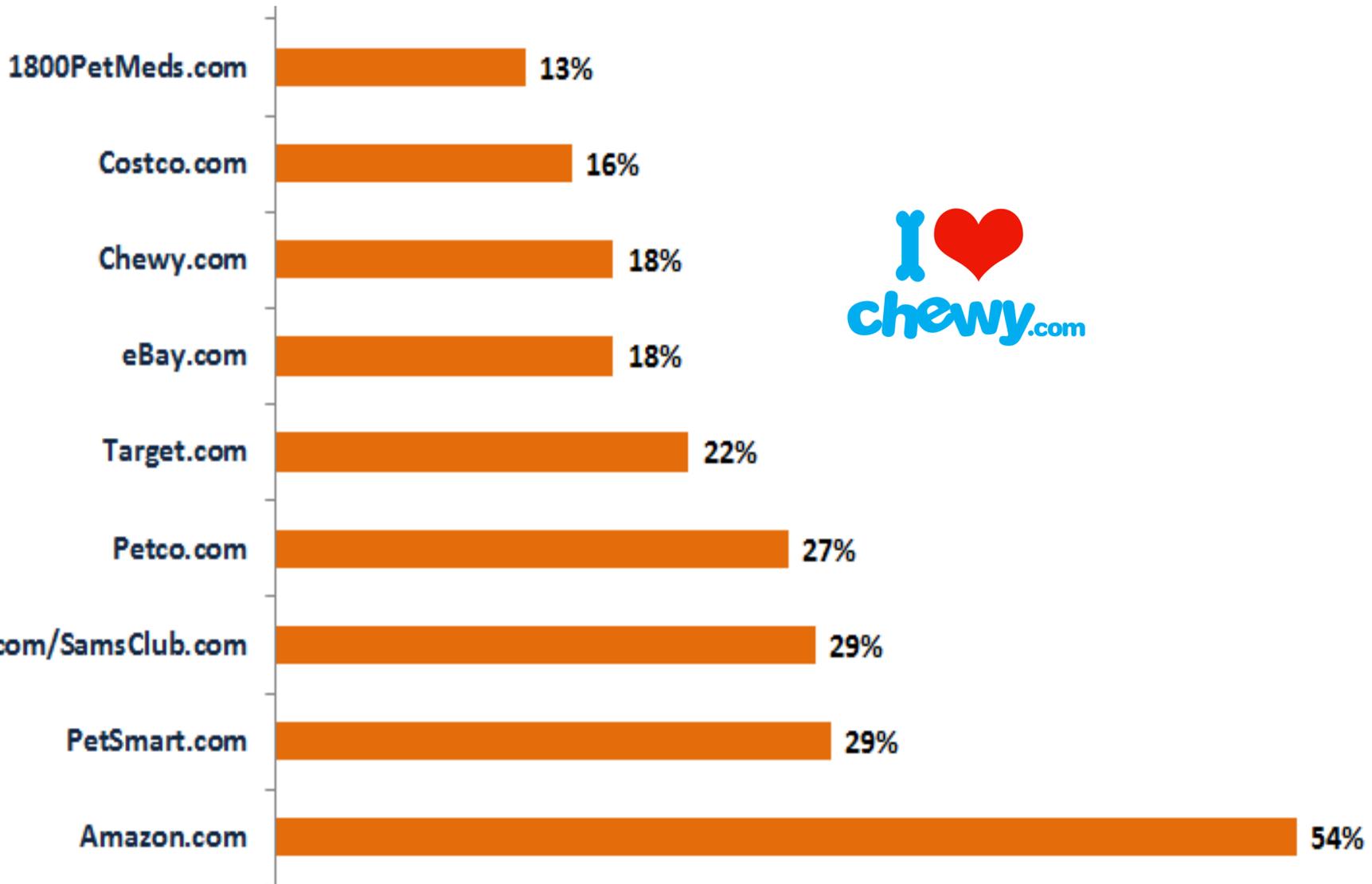
Simmons Market Research National Consumer Survey, Fall 2016. Copyright: 2017

# Retail Shopping Channels for Pet Products, 2010 vs. 2016

	<b>2010</b>	<b>2016</b>	<b>% Point Change</b>
<b>Online</b>	7.0%	12.7%	5.7%
<b>Other (Dollar, Farm/Feed)</b>	13.0%	16.1%	3.1%
<b>Other Pet Stores</b>	13.1%	15.7%	2.6%
<b>Petco</b>	24.8%	26.9%	2.1%
<b>PetSmart</b>	34.8%	36.2%	1.4%
<b>Warehouse Clubs</b>	11.4%	12.4%	1.0%
<b>Petsmart/Petco</b>	46.3%	47.1%	0.8%
<b>Drugstores/C-stores</b>	4.4%	5.1%	0.7%
<b>Supermarkets</b>	47.4%	47.2%	-0.2%
<b>Veterinarians</b>	17.6%	14.6%	-3.0%
<b>Discount Stores</b>	30.8%	25.8%	-5.0%

# Online Purchasing of Pet Products Within Last 12 Months: By Website, 2017

Source: Packaged Facts, *U.S. Pet Market Outlook, 2017-2018* (April 2017)



# Dog Products Purchased Online in Last 12 Months

Packaged Facts December 2016 National Pet Owner Survey

<b>Dry pet food</b>	<b>38.4%</b>
<b>Pet Treats/Chews</b>	<b>37.0%</b>
Flea & Tick Medications	33.6%
Pet Vitamins/Nutritional Supplements	30.4%
Pet Grooming Supplies	27.9%
Flea & Tick Collars	26.4%
Pet Oral Care	25.4%
Wet pet food (canned or pouch)	24.7%
Pet Clean-Up, Odor Control, & Training Aids	22.4%
Heartworm Medications	21.7%

# Cat Products Purchased Online in Last 12 Months

Packaged Facts December 2016 National Pet Owner Survey

Dry pet food	37.2%
Cat Litter	32.8%
Pet Treats/Chews	30.2%
Cat Litter Boxes	30.2%
Flea & Tick Medications	28.9%
Wet pet food (canned or pouch)	28.5%
Pet Vitamins/Nutritional Supplements	24.0%
Pet Grooming Supplies	24.0%
Pet Clean-Up, Odor Control, & Training Aids	21.1%
Flea & Tick Collars	19.6%
Pet Oral Care	18.3%
Heartworm Medications	16.4%

# “I am buying pet products online more than I used to,” 2011-2017

	2011	2012	2013	2014	2015	2016	2017
<b>Strongly Agree</b>	4%	6%	8%	11%	15%	18%	27%
<b>Somewhat Agree</b>	10	12	14	14	18	19	13
<b>Neutral</b>	23	19	23	25	20	20	19
<b>Somewhat Disagree</b>	18	20	18	15	17	14	13
<b>Strongly Disagree</b>	45	43	38	35	29	29	27

Source: Packaged Facts, *U.S. Pet Market Outlook, 2017-2018* (upcoming)  
 Packaged Facts National Pet Owner Survey, February/March 2017





small pet

pet services

adoption

save 20% + get free shipping on your first auto ship order

SAVE 20% TODAY when you set up your first Autoship | [Learn more](#)

Save an extra 5-10%

on select brands with every Autoship order! [See all brands](#)

One-time purchase:  
\$9.65

Subscribe & Save:  
5% 15%  
\$9.17

Unlock 15% savings by  
subscribing to 5 products.  
[Learn more](#)

Qty: 1

Deliver every:  
1 month (Most common)

[Subscribe now](#)

Add to your Dash Buttons



[add to cart](#)

\$26.99  
IAMS PROACTIVE HEALTH Adult (Lamb & Rice)  
...  
★★★★☆ 914  
save 10% using Order Pickup  
subscription eligible  
get it tomorrow with express shipping

## Primary Reasons for Buying Pet Products Online, 2016

	Overall	18-34s	Urbanites	HHI \$100K+
Convenience--can shop anytime, any place	44%	33%	36%	38%
Competitive pricing	44%	35%	38%	41%
Good value due to free shipping	41%	32%	36%	38%
Product selection	35%	32%	35%	32%
Can more easily price compare	29%	33%	29%	29%
Shop a lot online generally	28%	29%	28%	30%
Online, it's easier to get extra product information and reviews	27%	33%	32%	25%
Can more easily find sales and promotions	26%	29%	30%	24%
Online, it's easier to find new products I might want to try	25%	29%	28%	26%
Good value due to tax savings	23%	22%	25%	24%
Online is convenient for "refill" purchases	17%	17%	20%	19%
Use automatic/scheduled delivery option	15%	18%	21%	20%

Source: Packaged Facts, *U.S. Pet Market Outlook, 2017-2018* (April 2017)

Packaged Facts National Pet Owner Survey, December 2016

- *plateau in pet ownership?*
- *online retailing reaches critical mass*
- ***other signs of these pet parenting times***

# “I consider my dogs/cats to be part of the family”

Packaged Facts Online Consumer Survey, February-March 2017



Strongly Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Strongly Disagree
69%	22%	7%	1%	1%



64%	25%	9%	1%	1%
-----	-----	----	----	----



# size of most recently acquired dog?

For puppies, answer in terms of anticipated adult dog size  
Packaged Facts Feb/March 2017 National Pet Owner Survey

Toy/Very Small (under 8 pounds)	10.7%
Small (8-24 pounds)	30.5%
Medium (25-40 pounds)	34.9%
Large (41-90 pounds)	20.5%
Giant (Over 90 pounds)	3.3%



## New APPA Data (2017-2018 handbook)

	2006	2008	2010	2012	2014	2016
<b>Base: Total Dog Owners</b>	(580)	(587)	(544)	(527)	(521)	(505)
<b>Size of Dog:</b>						
Own small dog(s)	38	44	47	49	50	50
Own medium dog(s)	28	27	26	24	26	28
Own large dog(s)	48	45	47	41	37	35

# *urbanization of dog ownership*

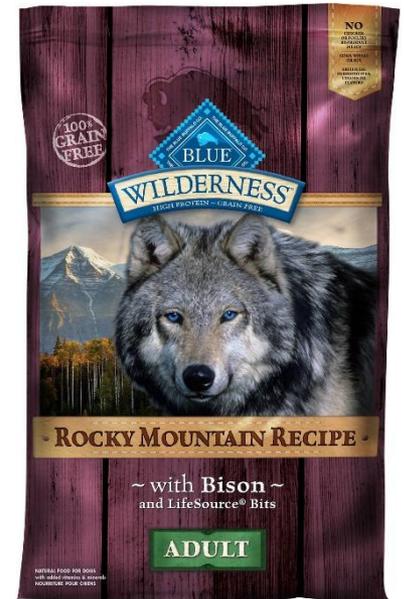
<b>Dog-Owning Households</b>	<b>2006</b>	<b>2011</b>	<b>2016</b>
Total (000) Dog-Owning HHs	39,107	44,414	48,747
Total (000) Dog-Owning HHs in Top 25 Metros	17,378	18,621	23,255
Dog Ownership Rate in Top 25 Metros	32%	32%	37%
% of Dog-Owning HHs in Top 25 Metros	44%	42%	48%
Total # (000) Dog-Owning HHs in Apart's/Condos	2,653	3,164	5,469
Total (000) Owning Land Around House	25,174	26,614	26,044
% Owning Land Around House	64%	60%	53%

# pet food attributes

Packaged Facts December 2016 National Pet Owner Survey

*Other than health conditions and concerns—  
for dog and cat foods, the product attributes  
consider most important*

Protein quality/content	43%
My pet really likes the taste	34%
Price represents good value	31%
Natural (other than organic)	28%
Product freshness	27%



# currently using pet foods with any “free of” claims?

Packaged Facts Feb/March 2017 National Pet Owner Survey

	Dog Owners	Cat Owners
Artificial ingredient free	30%	25%
No fillers/by-products	30%	25%
Grain-free/gluten free	28%	24%
Corn-free	26%	22%
Non-GMO	25%	24%
Soy-free	22%	17%
Low carb/low glycemic index	18%	16%
Potato-free/starch-free	17%	17%
None of the above	33%	40%



# *attitudes related to natural & organic pet food*

Packaged Facts Feb/March 2017 National Pet Owner Survey

	<b>Dog Owners</b>	<b>Cat Owners</b>	
<b>Natural/organic brand pet products are often better than standard national brands.</b>	<b>Strongly agree</b>	<b>25%</b>	<b>24%</b>
	Somewhat agree	36%	32%
	Neither agree/disagree	28%	30%
	Somewhat disagree	8%	9%
	Strongly Disagree	4%	5%
<b>I consider natural/ organic pet foods to be safer than regular pet foods.</b>	<b>Strongly agree</b>	<b>26%</b>	<b>24%</b>
	Somewhat agree	34%	33%
	Neither agree/disagree	28%	29%
	Somewhat disagree	7%	7%
	Strongly Disagree	5%	7%

# safety concerns and pet nutrition products

Packaged Facts Feb/March 2017 National Pet Owner Survey

	Dog Owners	Cat Owners
<b>I am concerned about the safety of the pet food and pet treats/chews I buy.</b>	<b>38%</b>	<b>35%</b>
Somewhat agree	37%	34%
Neither agree/ disagree	17%	21%
Somewhat disagree	5%	7%
Strongly Disagree	3%	4%



# *attitudes related to pet food & health*

Packaged Facts December 2016 National Pet Owner Survey

	<b>Pet Owners Overall</b>	<b>Online Pet Product Buyers</b>	
<b>High-quality pet foods are effective for preventive healthcare.</b>	<b>Strongly agree</b>	<b>27%</b>	<b>35%</b>
	Somewhat agree	34%	38%
	Neither agree/ disagree	30%	22%
	Somewhat disagree	6%	3%
	Strongly Disagree	4%	2%
<b>Targeted pet foods/treats with special nutrition benefit pets with specific health concerns.</b>	<b>Strongly agree</b>	<b>25%</b>	<b>34%</b>
	Somewhat agree	37%	37%
	Neither agree/ disagree	29%	21%
	Somewhat disagree	4%	4%
	Strongly Disagree	5%	3%

# pet food purchasing by formulation

Packaged Facts December 2016 National Pet Owner Survey

currently using pet foods with special formulations or ingredients to address specific health concerns?

	Overall	Online Pet Product Buyers
Dog Owners	34%	50%
Cat Owners	31%	46%

currently using pet treats with special formulations or ingredients to address specific health concerns?

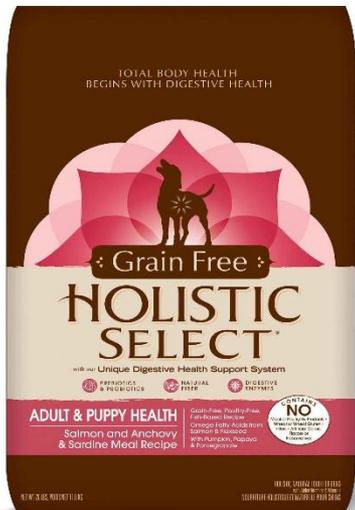
Dog Owners	30%	45%
Cat Owners	23%	38%



# in the last 3 months, have you purchased any type of DOG foods targeting the following pet health conditions or concerns?

Packaged Facts December 2016 National Pet Owner Survey

*expanding  
range of  
health  
concerns*



	Overall	Online Pet Product Buyers
Cognitive (brain health)	20%	31%
Digestive health	17%	23%
Skin/coat	14%	16%
Weight loss or maintenance	12%	15%
Heart health	11%	14%
Omega fatty acid intake	11%	14%
Joint health	10%	12%
Dental/oral health	9%	12%
Senior/anti-aging	8%	10%
Liver support	8%	11%
<b>Probiotics intake</b>	<b>8%</b>	<b>10%</b>
Kidney support	8%	10%
Thyroid health	7%	9%
Urinary support	7%	9%
Other health condition	7%	10%

# in the last 3 months, have you purchased any type of DOG treats targeting the following pet health conditions or concerns?

	Overall	Online Pet Product Buyers
Dental/oral health	25%	27%
Calming or motion sickness	15%	25%
Skin/coat	10%	15%
Joint health	10%	15%
Digestive health	9%	13%
<b>Probiotics intake</b>	<b>8%</b>	<b>13%</b>
Senior/anti-aging	8%	12%
Weight loss or maintenance	8%	12%
Cognitive (brain health)	8%	10%
Omega fatty acid intake	8%	12%
Liver support	8%	13%
Other health condition	8%	12%
Heart health	7%	11%
Thyroid health	7%	11%



# Thundershirt Dog Anxiety Treatment- Heather Gray

[shop all Thundershirt](#)

expanding  
range of  
wellness  
concerns



# “I am more concerned than I was a few years ago about the treatment of animals raised for food”

Packaged Facts Online Consumer Survey, February-March 2017

<b>Strongly Agree</b>	<b>Somewhat Agree</b>	<b>Neither Agree Nor Disagree</b>	<b>Somewhat Disagree</b>	<b>Strongly Disagree</b>
<b>26%</b>	<b>32%</b>	<b>28%</b>	<b>8%</b>	<b>6%</b>



(Texas)  
**THE FOOD REVOLUTION!™**

Merrick is leading the food revolution today by making healthy and nutritious food for your dogs in our family kitchens. In Texas, 97% of cattle ranches are family run. Beef ranchers in Texas take special pride in humanely raising natural, wholesome, and high-quality beef that's as healthful as it is delicious.

We use **REAL TEXAS DEBONED BEEF** as our #1 ingredient with **38% protein in every bowl**. Our grain-free recipe is for pet parents who prefer not to feed wheat, corn or rice.

*Real Beef from Texas*



**BRIEF**

**NOSB supports higher welfare standards for organic meat and poultry**



Packaged  
Facts

A division of MarketResearch.com, Inc.

11200 Rockville Pike

Rockville MD 20852

USA

[www.PackagedFacts.com](http://www.PackagedFacts.com)

[kc.MarketResearch.com](http://kc.MarketResearch.com)